

Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account (IRA) to Harvard

____, 201__

Custody Agent
Address

**RE: Request for Charitable Distribution from Individual Retirement Account # _____
in the name of _____**

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____ as provided by The Trade Facilitation and Trade Enforcement Act of 2015.

Please issue a check in the amount of \$ _____ (not to exceed \$100,000) payable to "The President and Fellows of Harvard College" and mail it directly to the following address:

University Planned Giving
Harvard University
124 Mount Auburn Street
Cambridge, MA 02138-5795
Attention: Kara Morin – IRA

In your transmittal to Harvard University, please give my name and address as the donor of record in connection with this transfer, and indicate that the check is for the benefit of _____ [i.e. Harvard School/affiliate and purpose]. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 201__ tax year.

If you have any questions, or need to contact me, I can be reached at: (____) ____-____.

Thank you for your assistance in this matter.

Sincerely,

Plan Owner Name

Plan Owners Address

_____, 201_
DONOR ADDRESS

Denise Gorayeb, Recording Secretary
Recording Secretary's Office
Harvard University
124 Mount Auburn Street, Suite 430N
Cambridge, MA 02138

Dear Madam:

I have written to my IRA custody agent, _____. to request a distribution of
\$_____ directly to Harvard as a charitable gift, for the support of:
_____.

I would appreciate a written confirmation when you have received the funds. I understand
that I will not receive a federal income tax deduction for making this gift.

Thank you for your attention to this matter. If you have any questions, please contact me at
(phone number)_____ or donor_email_address@post.harvard.edu.

Sincerely,

DONOR